Career Advancement Accounts
Toolbox 2.0 Desk Aid

After verifying a customer's eligibility documentation, the customer should be enrolled in Toolbox 2. Enrollment is WIA is not required but the eligibility requirements in Toolbox must be completed to enroll a customer for their CAA. All Job Seeker information should be completed as appropriate. The CAA is a customer driven training account the assessment tools in Toolbox may be used as need to assist the customer in selecting a training program.

Reference the Job Seeker Registration desk aid for directions on how to register a job seeker.

ELIGIBILITY

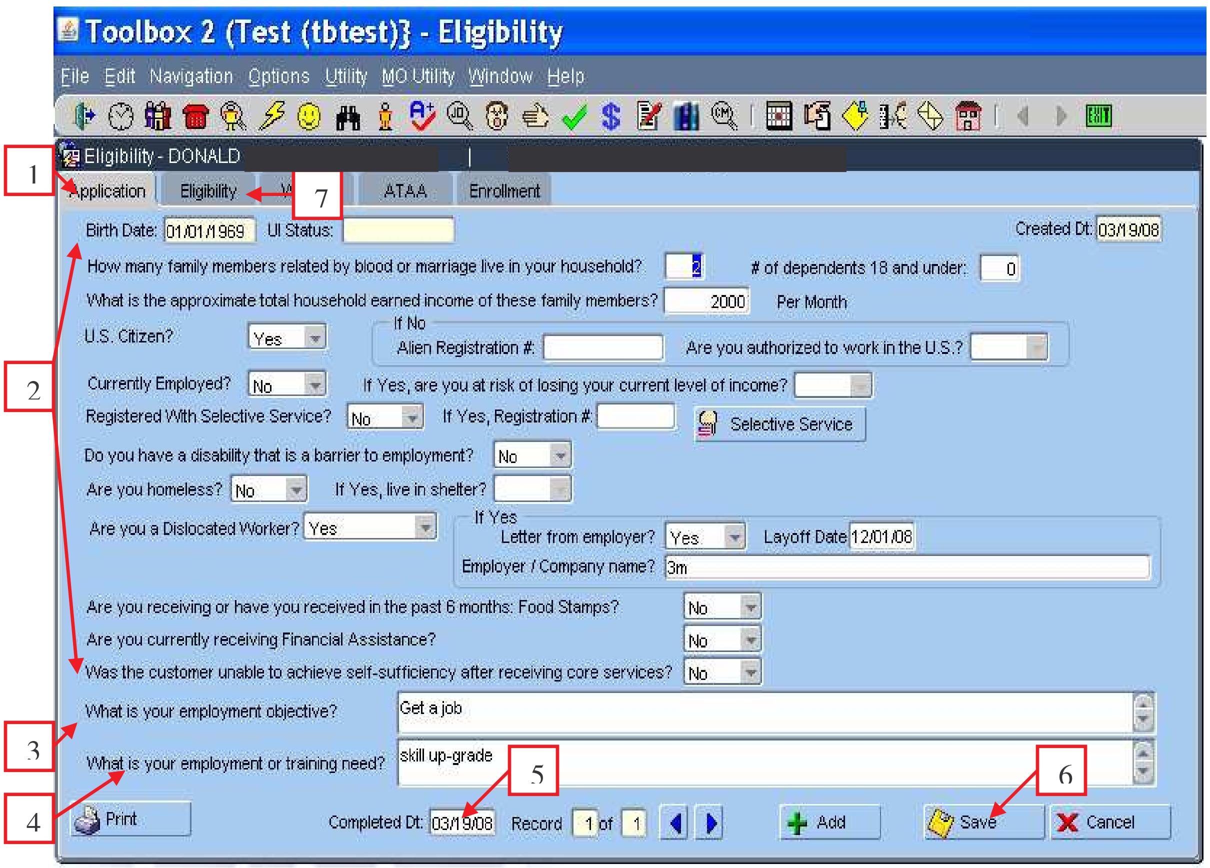

Figure 1: Eligibility Application Screen

Step-by-Step:

1) Select the Application tab
2) Complete the following data fields on the **Application** screen
   - Birth date
   - How many family members related by blood or marriage live in your household?
   - US Citizen? If no, Alien Registration number. Are you authorized to work in the US?

- Currently Employed? If Yes, are you at risk of losing your current level of income?
- Registered with Selective Service? If Yes, Registration number.
- Do you have a disability that is a barrier to employment?
- Are you homeless? If Yes, live in shelter?
- Are you a Dislocated Worker? If Yes, Letter from employer? Layoff Date. Employer/Company name?
- Was the customer unable to achieve self-sufficiency after receiving core services?

3) Enter Employment Objective in the free form text box.
4) Enter Employment and Training Need in the free form text box.
5) Double click on the Completed Date field and enter the current date
6) Click the Save button**.**
7) Select Eligibility tab

Eligibility Tab Screen

The **Eligibility tab screen** is used by the case manager to determine if the customer meets the eligibility requirements for training programs.

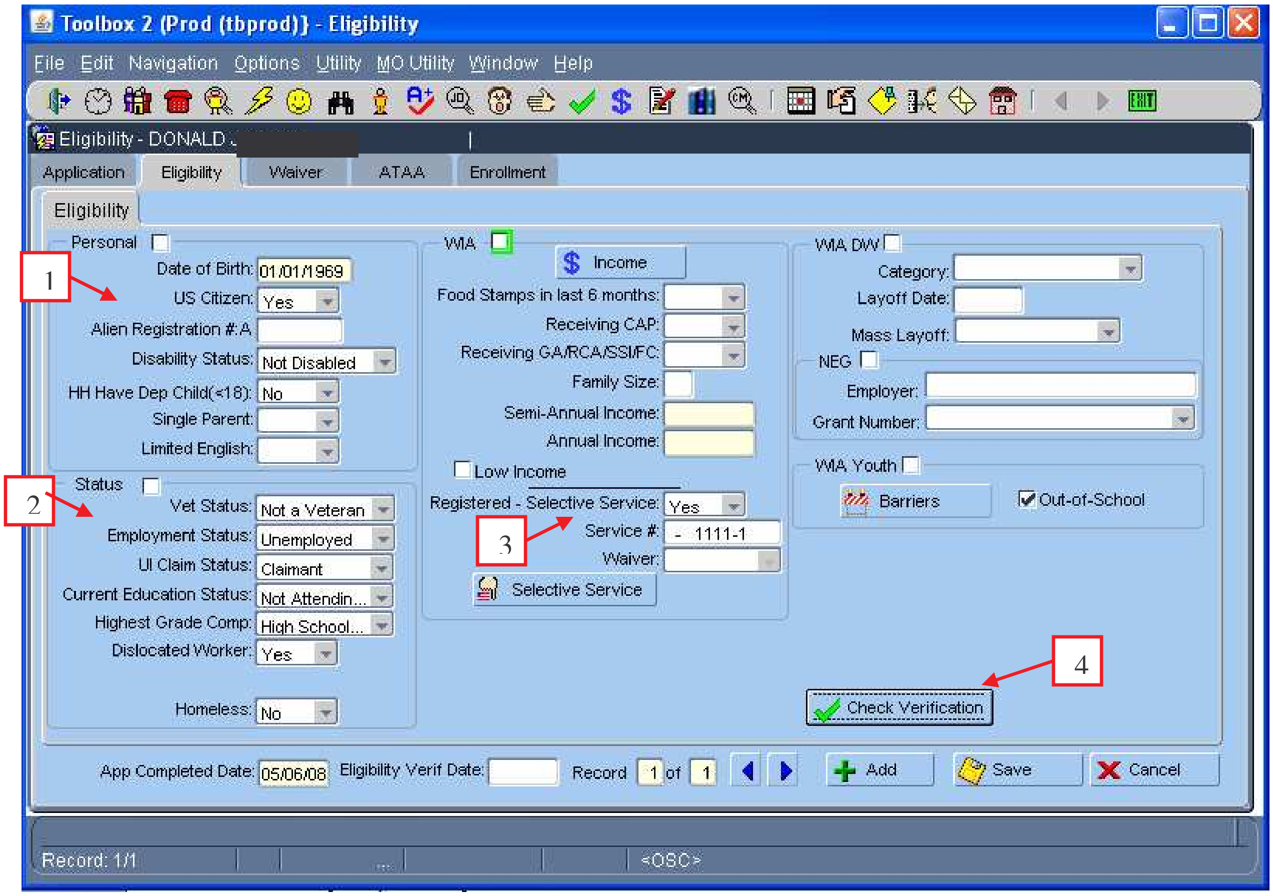

Figure 2: Eligibility Screen
Eligibility Tab Screen

Step-by-Step:

1) Complete all the applicable fields in the Personal Section
2) Complete all of the following fields in the Status Section, click on the field and select the appropriate response, some CAA applicants may still be employed check the appropriate employment status from the dropdown box.
    - Veteran Status
    - Employment Status
    - UI Claim Status
    - Current Education Status
    - Highest Grade Completed
    - Dislocated Worker
    - Homeless
3) Complete the Registered Selective Service information if applicable.
4) Click on the Check Verification button.

Enrollment Tab Screen

The **Enrollment Tab Screen** is used to enroll customers in programs they are eligible and qualify for.

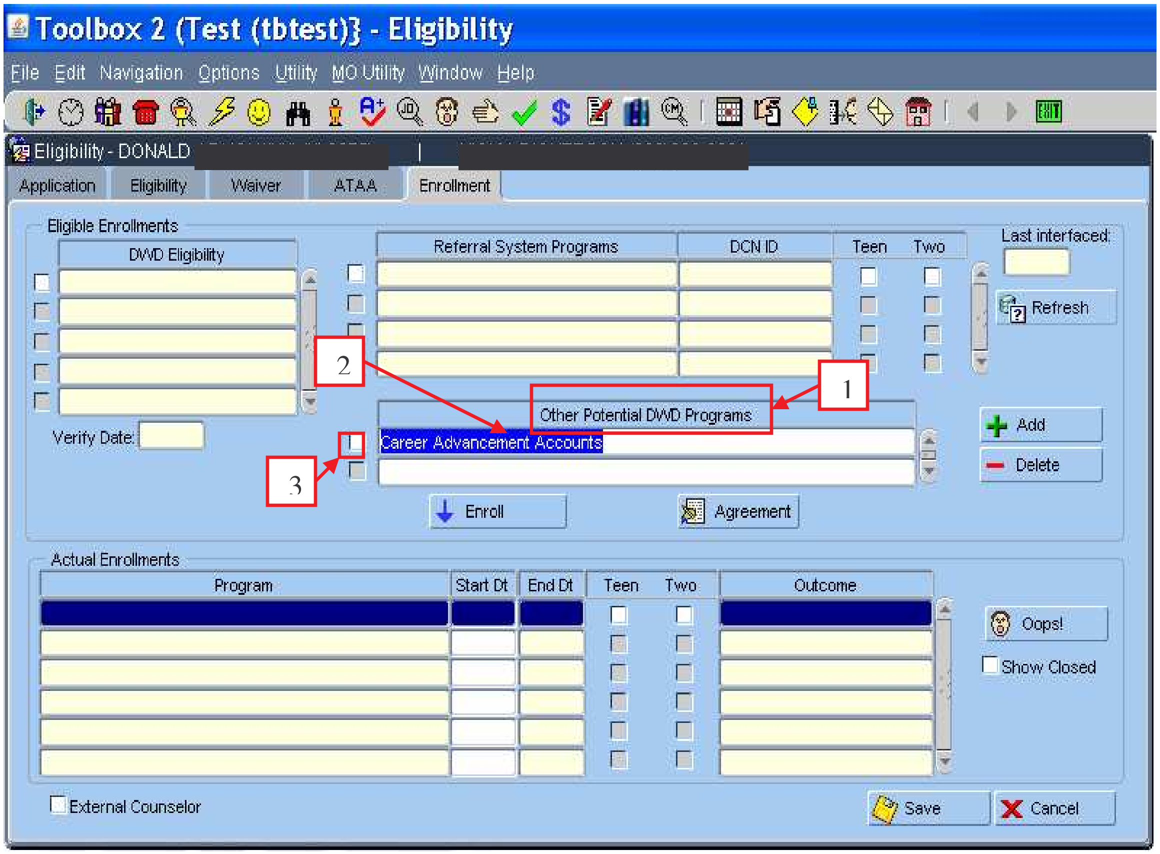

Figure 4: Eligibility Enrollment Screen

Step-by-Step:

1) Enrollment into the CAA program is located in the "Other Potential DWD Programs"
2) Double click on the Other Potential DWD Programs text box.
3) A list of values will appear; from that list select **Career Advancement Accounts**.
4) Click on the check box in front of the text box; this will bring up the CAA eligibility information.

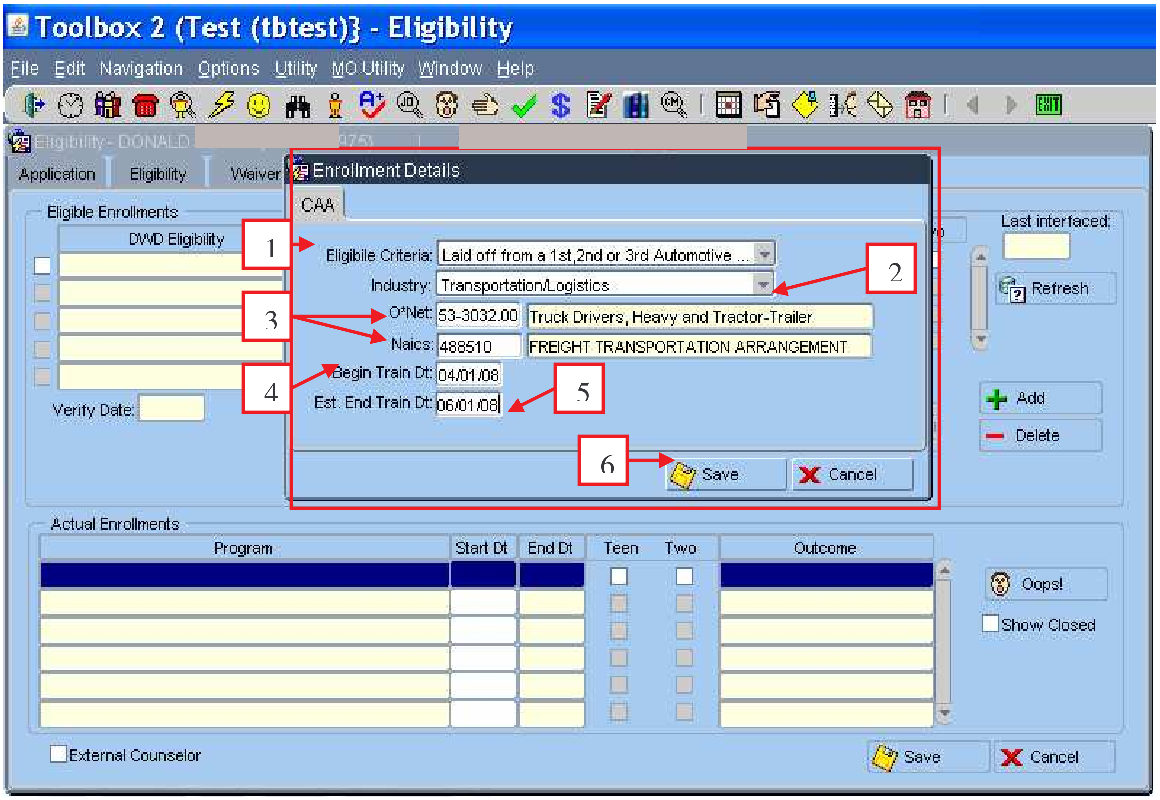

Figure 5: Eligibility Enrollment Screen
Enrollment Details

Step-by-Step:

1) Click on Eligibility Criteria text box and select customer's Eligibility type.
2) Click on Industry and select type of career training customer is selecting.
3) Determine O*Net and NAICS codes for customers career selection.
4) Enter Customers Begin Training Date.
5) Enter Customers Estimated End Training Date.
6) Click on the Save button. And return to Enrollment Tab.
7) Return to Enrollment Tab to enroll customer in CAA program.

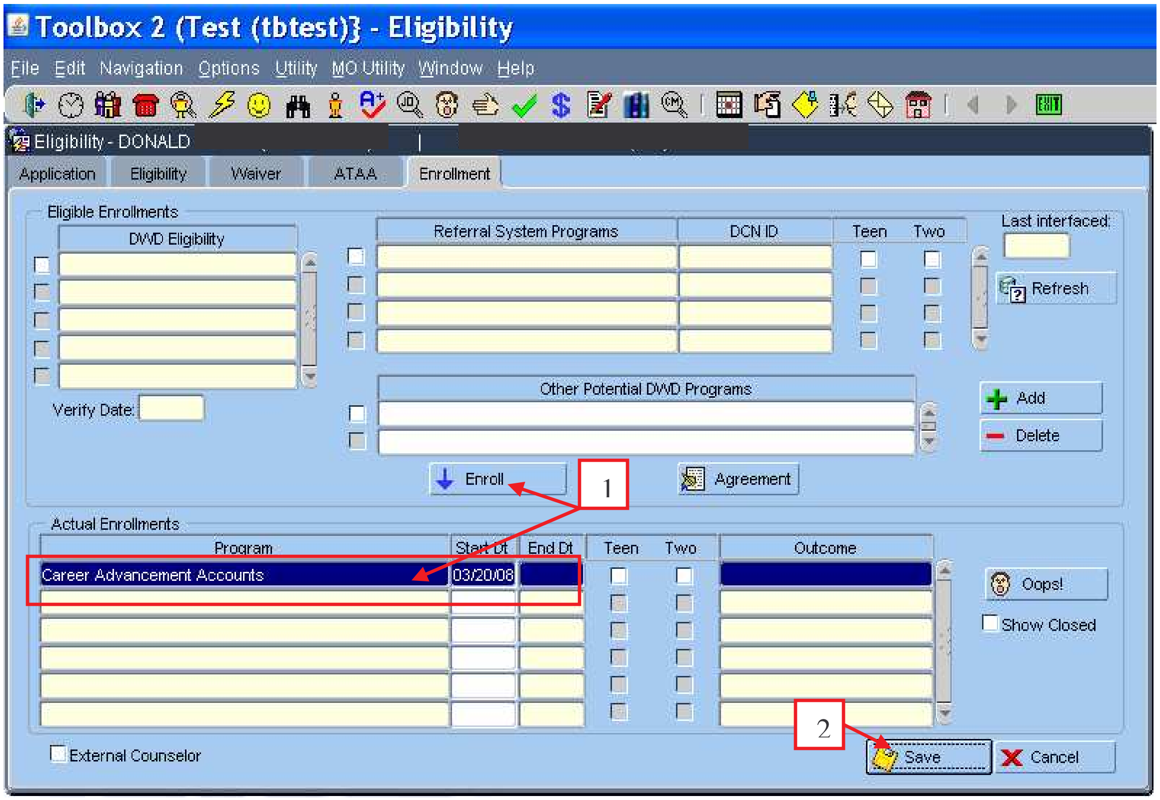

Figure 6: Eligibility Enrollment Screen

Step-by-Step:

1) Click on the Enroll button. By clicking on enroll button, the customer's enrollment in Career Advancement Account Program will show up in the Actual Enrollment in the Program section.
2) Click on the Save button.

EMPLOYMENT PLAN

The **Employment Plan** is used to develop an agreement between the customer and the program to establish the activities and responsibilities necessary for the customer to succeed.

Enrollment Tab

The **Enrollment Tab screen** is the same tab is the same tab in the Eligibility Screen and may be used to enroll the customer in additional programs.

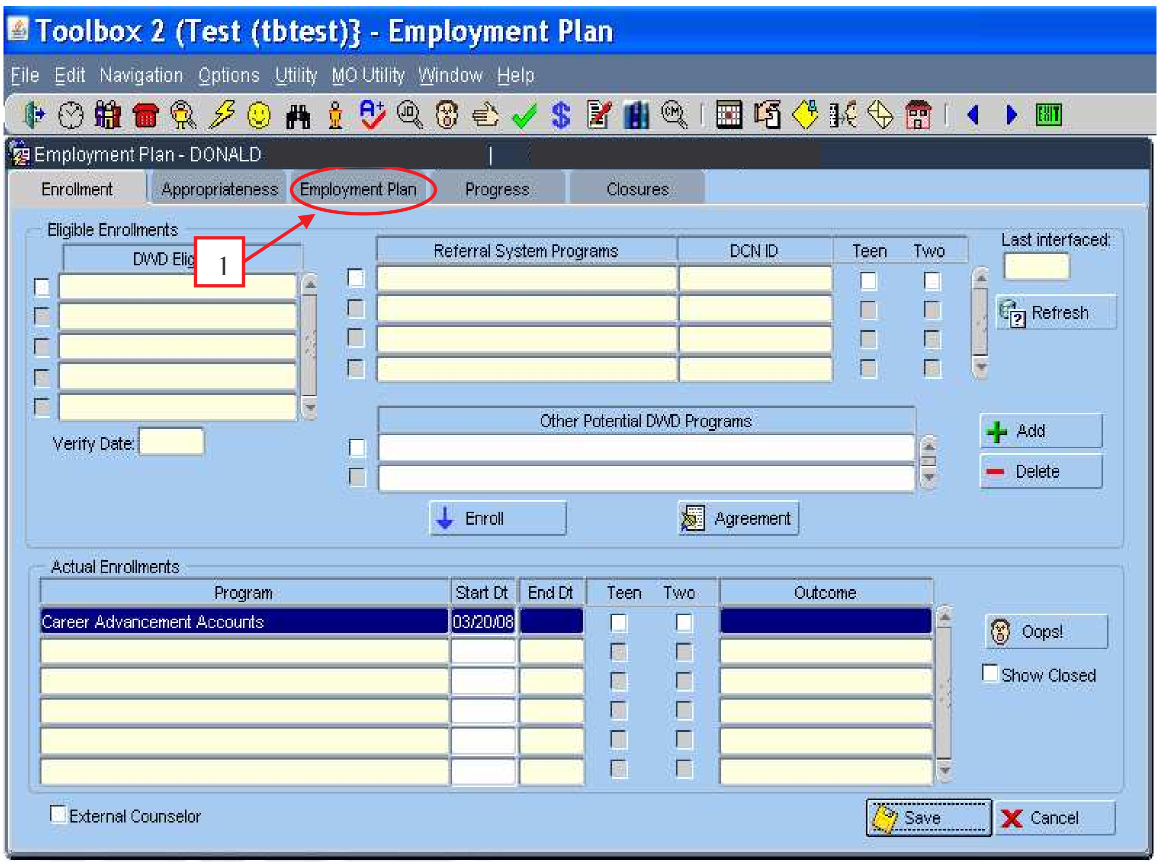

Figure 7: Employment Plan
Enrollment Screen

Step-by-Step:

1) Click on the Employment Plan screen.

Appropriateness Tab

The Appropriateness tab screen is provided to help the customer assess their expectations for completing training and entering a new career path.

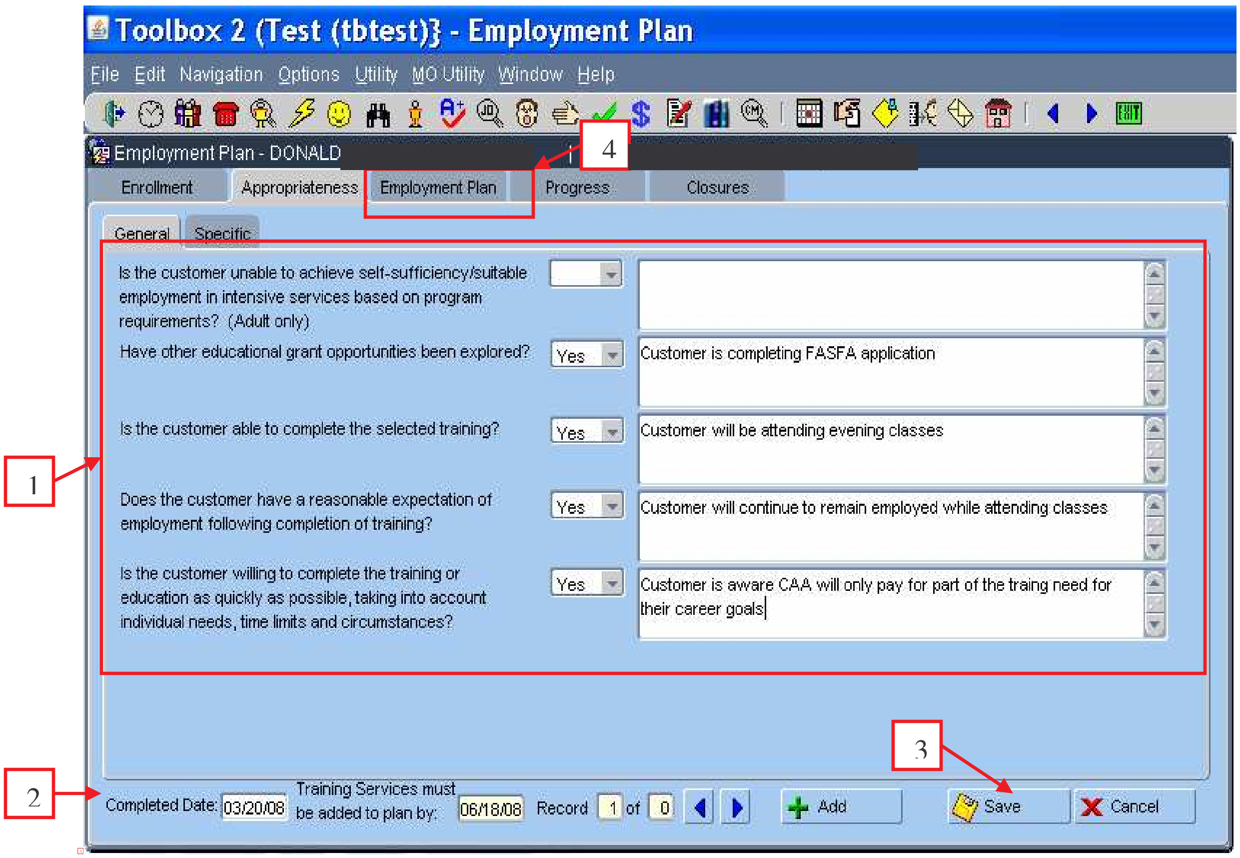

Figure 8: Employment Plan
Appropriateness General Screen

Step-by-Step:

1) Complete the following questions of the Appropriateness General tab. A Free Form text box is available to clarify any issues regarding the customers training needs
   - Is the customer unable to achieve self-sufficiency/suitable employment in intensive services based on program requirements?
   - Have other educational grant opportunities been explored?
   - Is the customer able to complete the selected training?
   - Does the customer have a reasonable expectation of employment following completion of training?
   - Is the customer willing to complete the training or education as quickly as possible, taking into account individual needs, time limits and circumstances?
2) Double click on the Completed date to enter current date the Training Services must be added to the Plan by will auto populate 3 months in the future.
3) Click the Save button.
4) Click on the Employment Plan Tab.

Employment Plan Tab screen

The **Employment Plan tab screen** is a tool to assist the case manager in outlining a plan to assist the customer in obtaining their career goals.

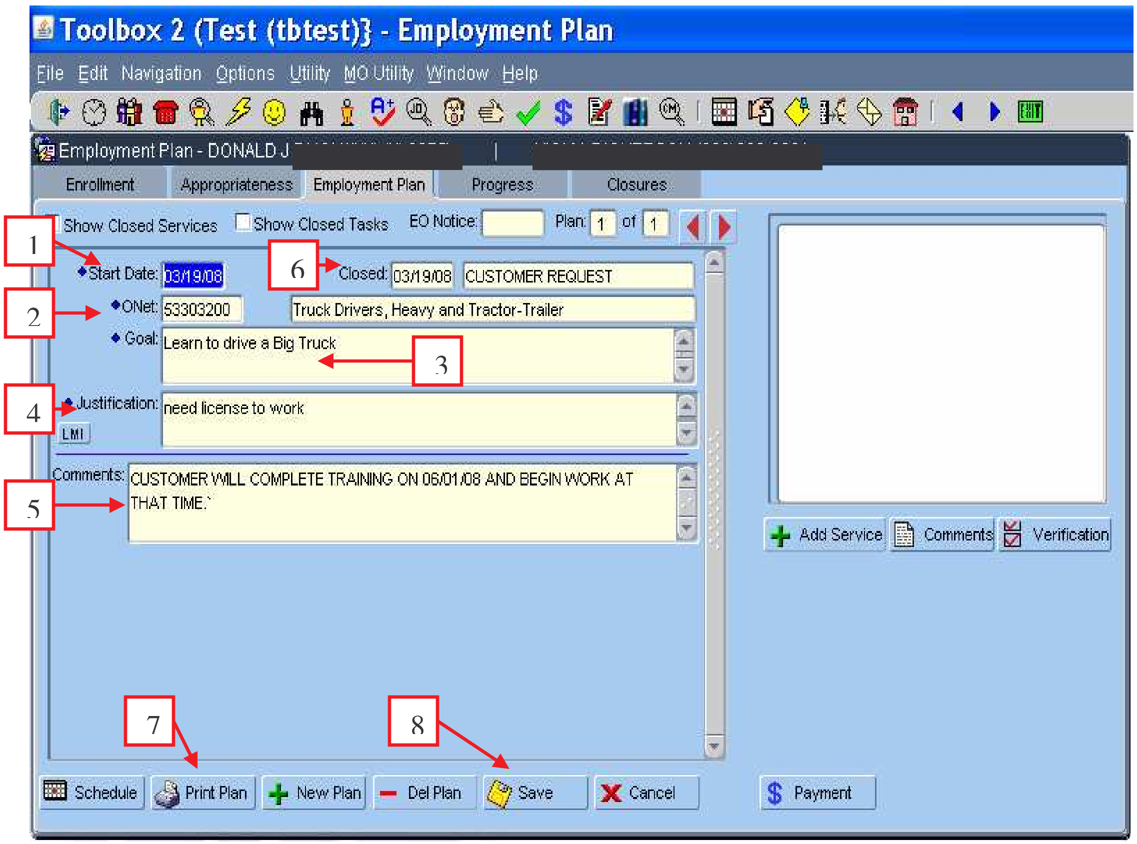

Figure 9: Employment Plan

Step-by-Step:

1. Enter a Start Date**.**
2. Enter an O*Net code by double clicking on the text box. The O*Net codes chosen in the registration under the "Desired Job Titles" will appear. If new O*Net codes are needed, click the cancel button and there will be a prompt to choose from all O*Net codes.
3. Enter an **"**Employment Goal**"** in the text box.
4. Enter a "Justification**"** to explain the employment plan goal in the text box. Enter an **"**Objectives**"** and a **"**Services**"** by double clicking in the text box for a list of values. Use "Objectives" and "Services" to build the outline of the plan. Objectives/Services can be closed when the customer has completed all the tasks related to the objective/service. Use the Employment Plan Tree to go to a specific objective or service desired. Click the "Add Service" or "Del Service" buttons to add or delete objectives/services.
5. Once Objectives and Services are selected; a "Task" text box will appear. **"**Tasks**"** allow more specific detail about how the customer will meet each Objective/Service.

Tasks are used to detail how the customer will achieve each section of their employment plan. Tasks can be set as completed (Y) or not completed (N). Click the "Add Task" or "Del Task" buttons to add or delete tasks.

6. Enter "End Date" and "Outcome" to close.
7. Print plan and give copy to customer for their signature. Keep signed copy for customers paper file**.** ***See Figure 10***.
8. Click on the "Save" button

EMPLOYMENT PLAN

For : DONALD

HLCI / PID:

Employment Counselor:

Printed on : 03/20/08

Job Title: Truck Drivers, Heavy and Tractor-Trailer

Employment Goal:

Learn to drive a Big Truck

This is my Employment Goal Because:

need license to work

Comments:

CUSTOMER WILL COMPLETE TRAINING ON 06/01/08 AND BEGIN WORK AT THAT TIME.`

This plan has been developed in partnership with the Department of Workforce Services and Donald Duck. Donald agrees with the above employment plan and understands his/her rights, responsibilities, and the appropriate program(s) grievance procedure(s) Donald has also received the Equal Opportunity policy.

Figure 10: Employment Plan Print Out

Progress Tab Screen

The Employment Plan Progress tab screen is used by the case manager to record Plan Progress notes. Progress Evaluation Notes are displayed and the case manager can add new notes or print out the existing notes.

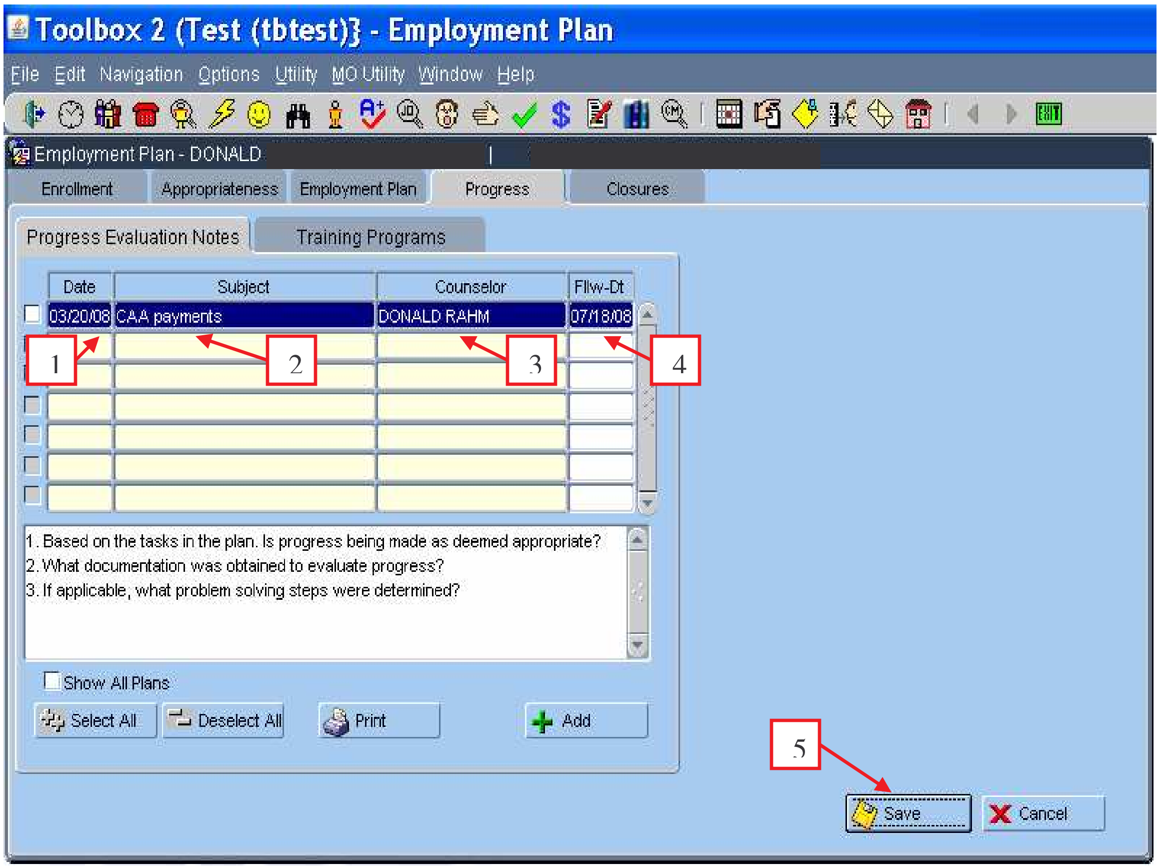

Figure 11: Employment Plan Progress Progress Evaluation Notes Tab Screen

Step-by-Step:

1) Enter the Date.
2) Enter a summary of the Progress Note in the Subject text box.
3) Enter the Counselor's name.
4) Enter a follow up date.
5) Click the Save button.

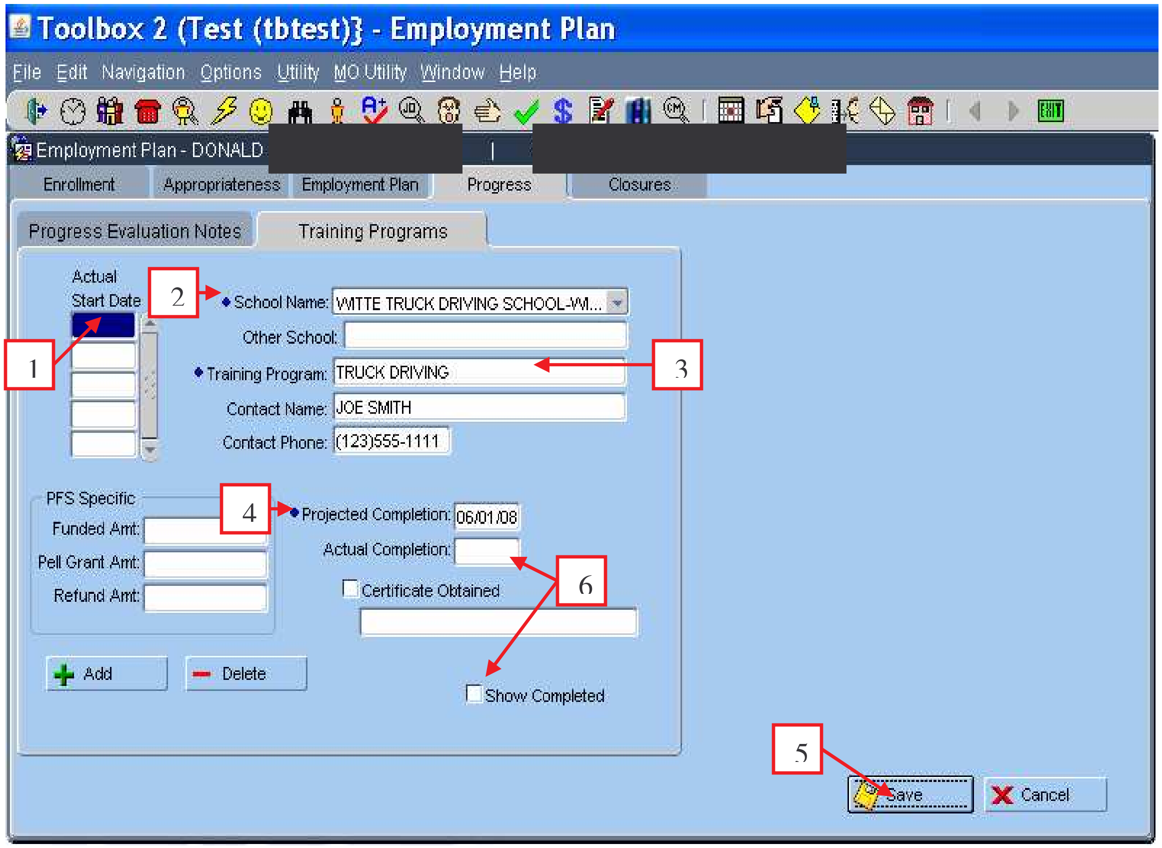

Figure 12: Employment Plan Progress
Training Programs Tab Screen

Step-by-Step:

1) Enter the Actual Start Date that the participant entered training.
2) Enter the School Name of where the training will take place.
3) Enter the Training Program that the participant is enrolled in.
4) Enter the Projected Completion date.
5) Click the Save button.
6) When the participant completes the training program, enter the Actual Completion date in this section and check the box to Show Completed.

Closure Screen

The Closure screen provides the case manager the ability to close services, enrollments and the employment plan from one screen.

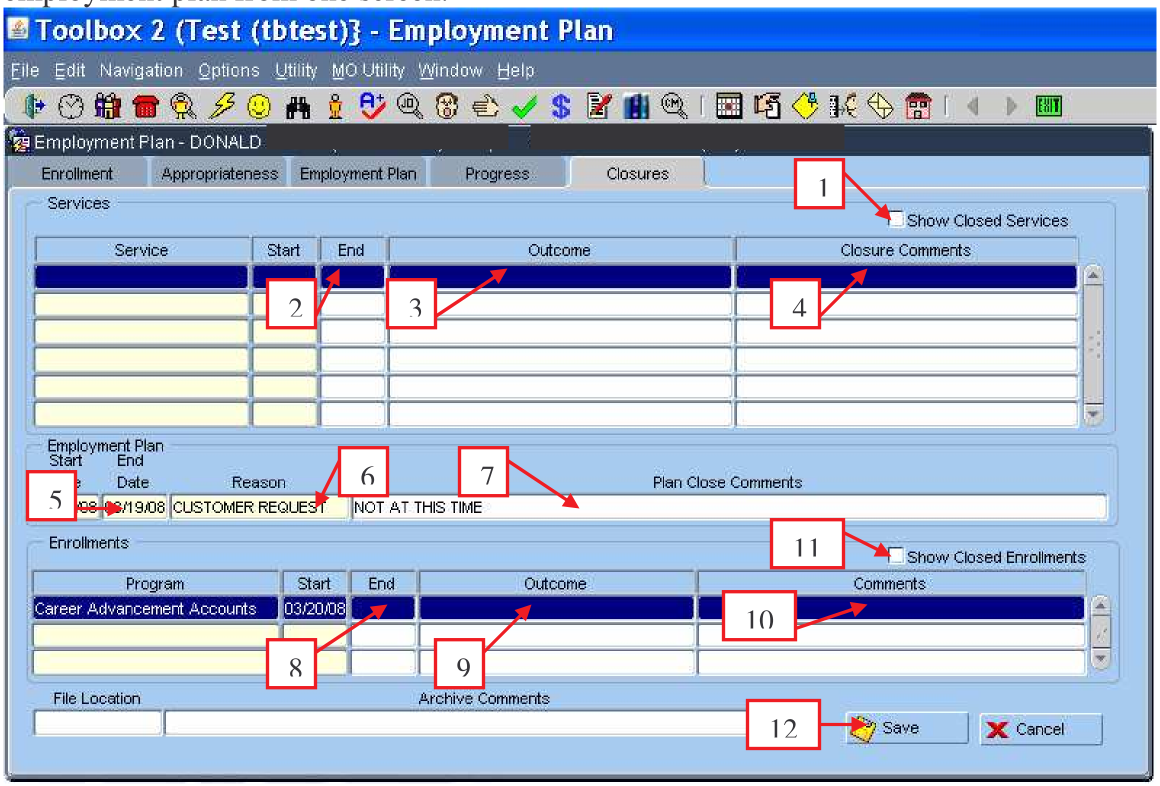

Figure 13: Employment Plan Progress Closures Tab Screen

Step-by-Step:

1) The services section displays all of the open services for the current employment plan. To see closed services for this plan click the "Show Closed Services" box.
2) To close services; highlight the service to be closed and enter an End Date.
3) Enter an Outcome for that service by double clicking on the text box and choosing the outcome from the list of values.
4) The Closure Comments field is optional
5) The Employment Plan section only displays the employment plan start date. To close the plan, enter the End Date. Employment plans cannot be closed if there are open services.
6) Enter a Reason for Closure for the plan by double clicking on the text box and choosing the reason from the list of values.
7) The Plan Closure Comments field is optional.
8) The Enrollment section displays all of the open enrollments. To close enrollments enter an End Date.
9) Enter an Outcome for the Enrollment closure by double clicking on the text box and selecting the outcome from the list of values.
10) The Comment field is optional.
11) To see closed enrollments click the "Show Closed Services" box.
12) Click the Save button.

Seeker History

To view a report on the services the customer has received click on the Seeker History tab screen. The Seeker Services tab screen shows a history of services provided to the customer.

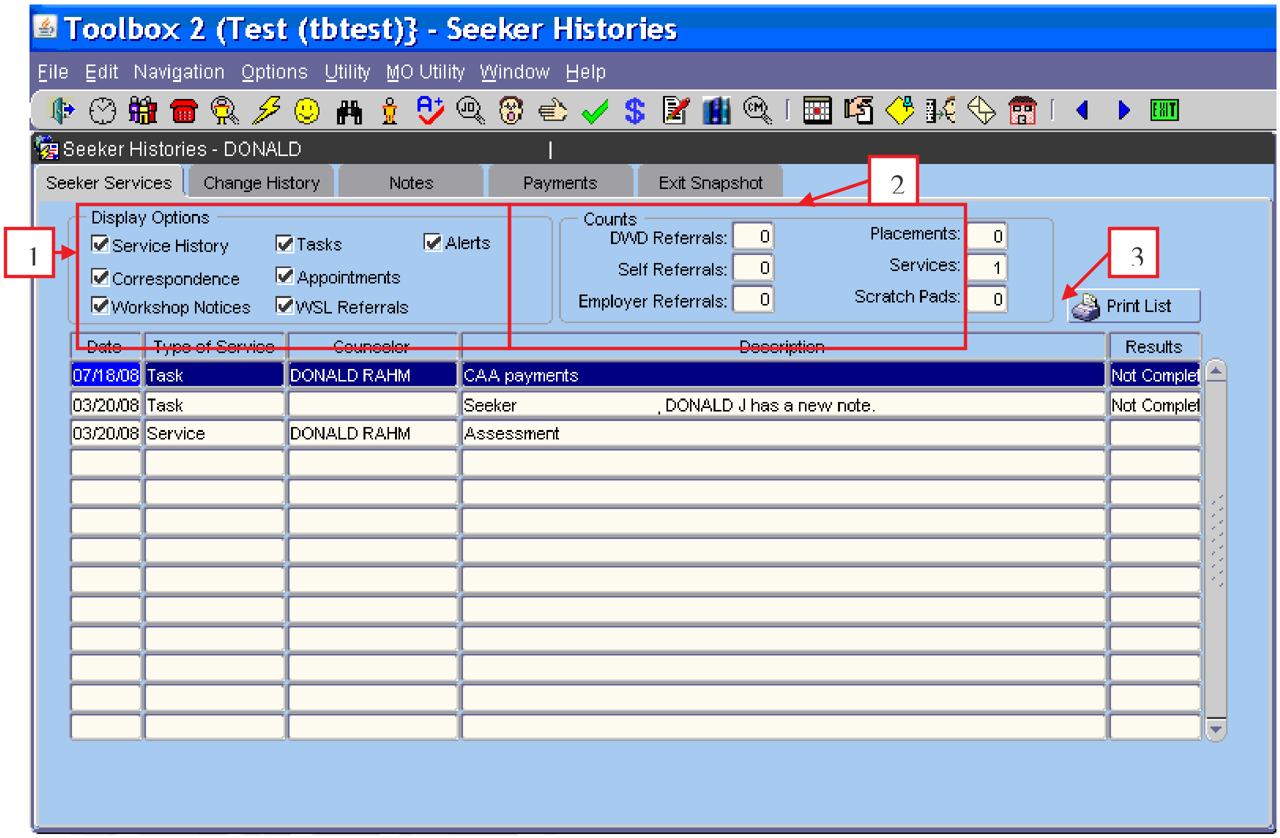

Figure 14: Seeker Histories
Seeker Services Tab Screen

Step-by-Step:

1) Check the boxes that need to be displayed from the participant's record. The Display Options that are available are:
    - Service History
    - Correspondence
    - Workshop Notices
    - Tasks
    - Appointments
    - WSL Referrals
    - Alerts
2) The Counts section allows the case manager to see Staff Assisted, Self, and Employer Referrals. Job Placements, Services and Scratch Pad counts are also displayed in this section.
3) The Print List button allows the case manager to print out a list of all of the services on the screen.

Change History Tab Screen

<u>The Change History tab screen</u> shows a history of some of the important changes that have been made. Change History will show the Date of the change, Change Type, Staff (case manager that made the change) and the Details.

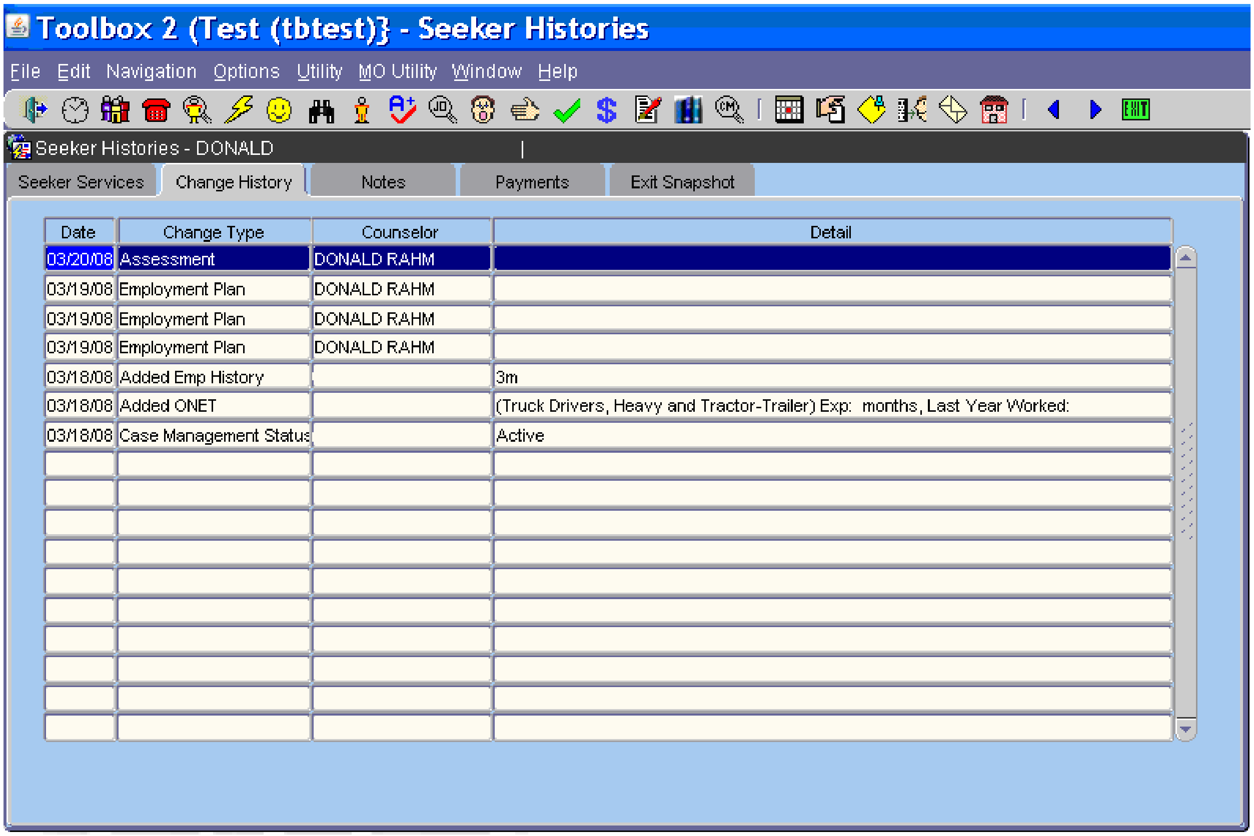

Figure 15: Seeker Histories
Change History Tab Screen

Seeker History: Notes Tab Screen

Seeker notes can be displayed from the <u>Notes tab screen in the Seeker History</u>. This allows the case manager to view the notes or use the Print button and print some or all of the notes. New notes cannot be entered from this screen.

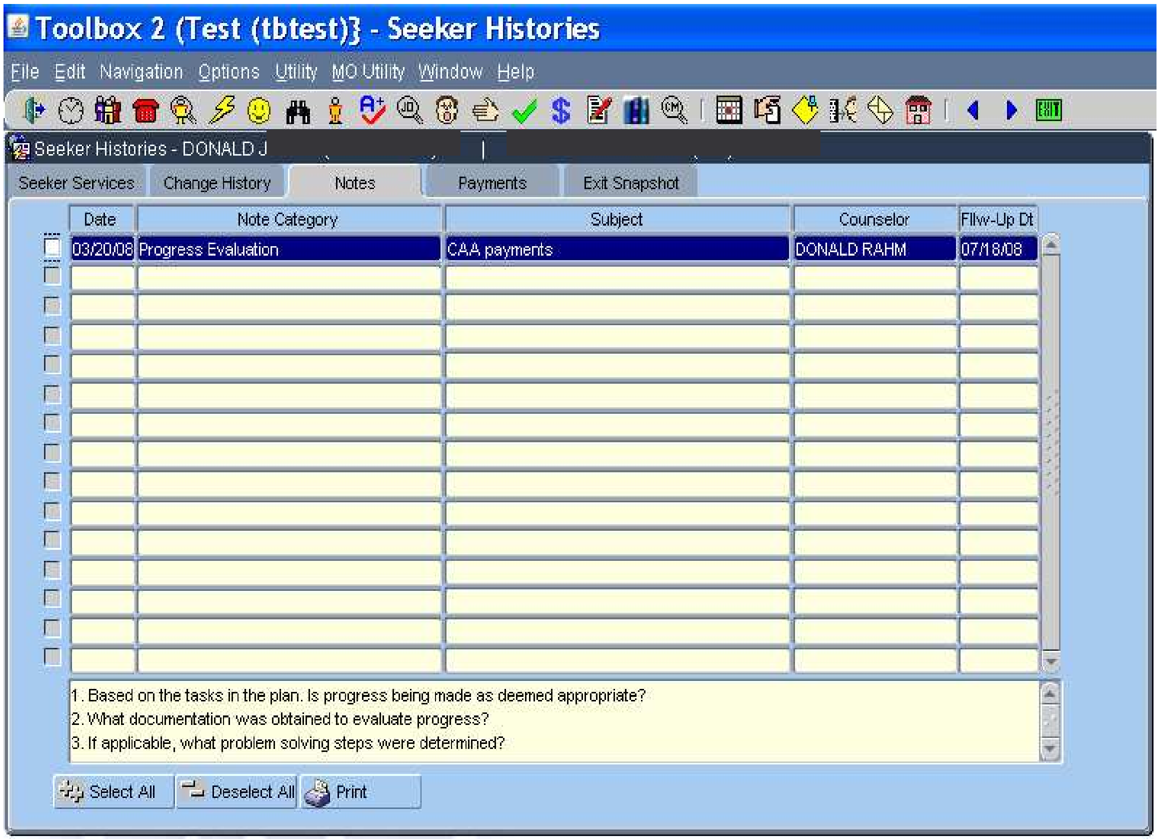

Figure 16: Seeker Histories
Notes Tab Screen